

**WITHHOLDING CERTIFICATE
FOR PENSION OR ANNUITY PAYMENTS**

Teachers' Retirement System of Alabama
P. O. Box 302150 ♦ Montgomery, AL 36130-2150
334-517-7000 or 877-517-0020
www.rsa-al.gov

Member Name _____ Social Security No. _____ - _____ - _____

If you do not complete this information, we are required to withhold as if you are a married individual claiming three exemptions.

Complete the following applicable lines:

1. ☐ I **do not** wish to have federal withholding tax deducted from my monthly pension or annuity. I realize that I am liable for payment of federal income tax on the taxable portion of my pension or annuity and that I may be subject to tax penalties under the estimated tax payment rules if my payment(s) of estimated tax and withholding are not adequate. *(Sign the form and return to TRS. Do not complete any other areas of this form.)*

2. ☐ I want to have federal withholding tax calculated using my marital status and the number of exemptions claimed. Complete both lines A & B.

A. Marital Status (Check One): ☐ Single ☐ Married ☐ Married, but withhold at higher Single rate
B. Total Exemptions Claimed: _____ (if blank, TRS will assume zero (0))

3. ☐ I wish to have \$_____ withheld from my monthly pension or annuity if this amount is **greater** than the amount on the tax tables. If this amount is **less**, I understand that the TRS must withhold in accordance with the tax tables. *(You must complete lines 2.A and 2.B above.)*

4. ☐ I want the following additional amount withheld from each pension or annuity payment. (For periodic payments, you cannot enter an amount here without entering the Marital Status on line 2.A. and the number, including zero (0), of allowances on line 2.B.)

\$ _____

Signature of Member _____ Date _____

Personal income tax questions should be directed to your tax advisor, accountant, or Internal Revenue Service Center.